	Before Visit	Day of Visit

Provider

Offers and screens patients who are interested in having their appointment be conducted via video when scheduling a patient's next appointment that is at least 7 days away using script. For patients who are interested and eligible for a video visit-> creates a telephone encounter and routes to "Telehealth Support Pool" using the Telehealth request subject line: Video offer/ video assistance. Schedule the Telehealth Video visit in Epic with provider.

Notifies MEA 15 mins from VV start time (using secure chat in Epic)

→ Conducts VV with patient

→ MEA or Provider uses SmartPhrase to give feedback on VV- Visit Quality/ Interpreter Services Needed

Front Desk Staff

Offers and screens patients who are interested in having their appointment be conducted via video when scheduling patient's next appointment that is at least 7 days away using script

Patient has agreed and is eligible for video visit

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Patient requests/ requires Zoom set-up

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Creates a telephone encounter and routes to "Telehealth Support Pool" using the Telehealth request subject line: Video offer/ video assistance Schedule the Telehealth Video visit in Epic with provider.

Patient does not request/ require Zoom set-up

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Let patient know a staff member will contact them before their scheduled video visit and will provide the correct Personal Meeting ID.

Patient has not agreed to video visit/ is not eligible for video visit

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If patient declines, staff ask why: technology, privacy, value? Confirm which type of appointment the patient will have (In-person, Telehealth Phone) and schedule accordingly and include in appointment notes "why patient declined VV"

Telehealth Ambassador

Access Telehealth Support Pool using "Zoom Video Visit set-up" instructions

Note: Telehealth onboarding requests may be in a few different InBasket folders depending how providers/staff started the encounter (ex. If starting a telephone encounter from the patient's chart, the request will appear in the "Patient Call" folder; if a provider sends a Staff Message to the telehealth pool and the request will appear in the "Staff Message" folder). As long as you are ONLY logged into the Telehealth Support Pool then you should only see telehealth pool related requests.

Successfully sets-up patient on Zoom

Patient is not successfully set-up on Zoom

1. Documents in UCSF Box/ Microsoft Teams that patient is successfully set-up (filling out each data column)

2. CCA/ Staff member will add a note in the Appointment Notes section "Patient is successfully set-up on Zoom"

1. Documents in UCSF Box/ Microsoft Teams that patient is not successfully set-up (filling out each data column)

2. Ambassador or designee will respond to the telephone encounter or staff message stating "Patient is not successfully set-up on Zoom" and include reasoning why (ex. Audio/ video unsuccessful). Identifies that scheduled telehealth video visit needs to be converted to a telehealth phone visit. Telephone encounter or staff message is routed to the staff/provider who sent the telehealth onboarding request.

3. Remove request from Telehealth Support Pool by selecting the "Done" button.

MEA	
	MEA retrieves iPad from safe location
	Calls patient to virtually "room" and reviews Health Care Maintenance with patient using script. Gives the patient Provider PMI

Assists with getting patient into the Zoom waiting room while troubleshooting issues/ concerns.

Highlights that patients should rename themselves when they enter Provider waiting room so it doesn't say "iPhone 10" or "Samsung Galaxy".

Patient is successfully "virtually roomed"

Patient is not successfully "virtually roomed"

MEA hands off iPad to Provider

Communicates to patient that Provider will call them directly for a telephone visit. Notifies Provider via Secure Chat in Epic that patient was not successfully "virtually roomed" and appointment is now a telephone visit.